

# **Documetrix<sup>®</sup> Express<sup>™</sup>**

## **Training Handout And Standardized Indexing Guide**

**for**

## **Electronic Document Workflow**



**Universal Systems Inc.**

*Technology that makes the bottom line.<sup>®</sup>*

**FOR DOCUMETRIX<sup>®</sup> EXPRESS<sup>™</sup> VERSION 2.8**

JANUARY 1999

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## **Standardized Indexing Format**

### **Folder Tab:**

<b><u>Field</u></b>		<b><u>Description</u></b>
Type		Select the folder type from the dropdown menu.
Cabinet		Select team name from dropdown menu.
Drawer		Select contractor or program name from dropdown menu.
Folder		Enter contract number for basic contract or contract document. otherwise use naming decided by the user based upon workload assignment methodology.
Status		Select folder status from dropdown menu.

### **Document Tab:**

<b><u>Field</u></b>		<b><u>Description</u></b>
Type		Select the document type that represents the document being scanned or imported, from the dropdown menu.
Identifier		Select the document identifier from the dropdown menu.
Title		Enter a descriptive phrase that identifies the contract or document. Example: P0001-increases unit price-1/3/96.
Format		Select the corresponding document format from the dropdown menu.
Form		Select the corresponding document form from the dropdown menu.
Created Date		Enter the date the document was created in the YYYYMMDD format.

*Note: other fields will be displayed, and need to be filled in, depending on the type of document selected.*

## **DCMC Document Identifiers**

ACO Modifications	Performance Based Payments
Closeout Actions	Plant Clearance
Commercial Invoices	Post Award Correspondence
Contract (SOW, CDRL's, etc.)	Pre-Award Surveys
Data Item Submittals	Pricing Issues/Audits/Negotiation
DD 250s	Production/Delivery
Engineering/ECPs/Waivers & Deviations	Progress Payment
Funding Letters	Property
General Correspondence	Public Vouchers
General Payment Information	Quality
Index	Reimbursables
Invoices	Safety
Legal Issues	Subcontract Info/Small Business
Letters To/From Contractor	Supplier's Miscellaneous
Letters To/From PCO/PM	Termination
Patent	Transportation
PCO Modifications	

# **Documetrix® Express™ Glossary**

## **Terms:**

*This glossary lists terms used in Documetrix® that may be unfamiliar to you.*

<b><u>Term</u></b>	<b><u>Definition</u></b>
Admin By (DODAAC)	Identifies the office responsible for administering the contract.
Adhoc Routing	Designates a document being sent through an adhoc workflow.
Cabinet Name	Designates the team name or other naming decided by the user. Provides a hierarchy for routing and is unique within the workflow.
Cage Code	Commercial and government entity code is a code similar to a DODAAC but specific to a vendor location.
Close Folder	Folder is closed. No further action is required. Contract is in section 5 or greater.
Created Date	Represents the contract issued date or for other documents, date of the document.
Delivery Order	Supplemental Procurement Instrument Identification Number (SPIIN) is a four-digit alpha/numeric serial number added to the basic PIIN to place delivery orders under indefinite delivery order contracts and basic ordering agreements.
Document Format	Represents the original format of the document. (for example, Microsoft Word = .doc, Microsoft Excel = .xls, etc.)
Document Identifier	Represents the category a document belongs to. There are two major categories: standard documents and user defined documents. There are 33 DCMC designated standard documents identifiers.

<b><u>Term</u></b>	<b><u>Definition</u></b>
Document Title	Represents the title of the document.
Drawer Name	Represents the name of the contractor or program. (lower level designation from team as determined by individual office.)
Folder Name	Represents the contract number for the basic contract and contract documents and other naming decided by the user. Provides a hierarchy for routing as is unique within the cabinet.
Issued By (DODAAC)	Identifies the office that issued the contract or other action.
Issue Date	Identifies the issue date of the document.
Key Words	Allows the user to assign an additional document description (keyword) to help narrow the search and retrieval process during database queries.
Location	Represents the originating location of the document.
Payment Office (DODAAC)	Identifies the office (the DFAS DODAAC) responsible for contract specific payment.
POC Modification	Modifications associated by the buying or procurement activity issued by procuring contracting officer (POC).
Revision Number	Represents the number of revisions made to a particular document.
Subject ( <i>Note: This field may be included on the bottom line where a descriptive field is entered.</i> )	Represents the subject of the document.
Suspense Date	Represents the assigned suspense date.
Suspense Status	Represents the status of a suspense (open or closed).
Transfer Folder	Designates folders for transfer to another CAO.

# **EDW Training Practical Exercise**

## **Team A**

1. Cabinet – Training Team A  
Drawer – Active Controls Experts  
Folder – F33615-97-C-3209  
Doc. Identifier (Doc ID) – Contract  
Doc. Format – SCANNED (TIF)  
Doc. Title - Award
2. Cabinet – Training Team A  
Drawer – Scientific Systems  
Folder – DAAB07-97-C-J531  
Doc. ID – General Correspondence  
Doc. Format – MS WORD (DOC)  
Doc. Title - Correspondence
3. Cabinet – Training Team A  
Drawer – Palmer  
Folder – N00383-96-C-M098  
Doc. ID – ACO Modifications  
Doc. Format – SCANNED (TIF)  
Doc. Title – Mod P0001
4. Cabinet – Training Team A  
Drawer – Active Controls Experts  
Folder – F33615-97-C-3209  
Doc. ID – Index/Check Sheets  
Doc. Format – EXCEL (XLS)  
Doc. Title – Excel Spreadsheet

## **Team B**

5. Cabinet – Training Team B  
Drawer – Active Controls Experts  
Folder – F33615-97-C-3209 (Active Controls Experts)  
Doc. ID – Closeout Actions  
Doc. Format – SCANNED (TIF)  
Doc. Title – CloseOut Check-list
6. Cabinet – Training Team B  
Drawer – Arthur D. Little  
Folder – F41624-96-D-5002/0002  
Doc. ID – Contract  
Doc. Format – SCANNED (TIF)  
Doc. Title – Purchase Order
7. Cabinet – Training Team B  
Drawer – Hittite Corp  
Folder – F08630-96-C-0037  
Doc. ID – Index/Check Sheets  
Doc. Format – SCANNED (TIF)  
Doc. Title – Prog Pay Record
8. Cabinet – Training Team B  
Drawer – Atmospheric Environmental  
Folder – F19628-96-C-0059  
(Atmospheric Environmental)  
Doc. ID – Contract  
Doc. Format – MS WORD (DOC)  
Doc. Title – Environmental Document





## **Suggested Bookmarks**

### **Contracts:**

#### **Sections**

Sol/Contract Form  
Supplies or Services  
Description/Specs/SOW  
Packaging & Marking  
Inspection & Acceptance  
Deliveries or Performance  
Contract Administration Data  
Special Contract Requirements  
Contract Clauses  
List of Attachments

#### **Points of Contacts**

POC's name, phone number and e-mail address  
AOC's name, phone number and e-mail address  
Contracts specialist's name, phone number and e-mail address  
Contracts administrator's name, phone number and e-mail address  
Contractors contracts manager's name, phone number and e-mail address  
Contractors program manager's name, phone number and e-mail address

#### **Review**

Abstract  
CARC  
DLA Form 1797

### **PCO Modification:**

#### **Post Award (Potential Second Tier Topic)**

DLA Form 1533  
Post Award Minutes  
Post Award Checklist, DD Form 1484

## **DFAS**

DLA Form 1797  
Request For Reconciliation  
Debt Collection Letters  
POCs

## **Pricing (Potential Second Tier Topics)**

DLA Form 1541  
DLA Form 716  
POC Request  
Request for Audit  
Request for Tech  
DCAA Report

## **ACO Modification:**

### **SPI**

Concept Paper  
Weekly Reports  
Notice to Comp. Lds  
DCAA Audits/Letters  
Tech Reviews  
Approval Letter  
Draft MOD & MOA  
Legal Correspondence

### **Expiring Funds**

Letters to/from KTR  
Monthly Updates

### **IPT's**

MOA  
Schedule  
Minutes  
Status Reports

## **PROCAS**

Charter  
Schedule  
Minutes  
Status Reports

## **P.I.**

MOA  
Letter of Delegation  
Surveillance Plans  
Purchase Orders  
Program Letter of Appointment  
Program Support Letters of Appointment

## **Technical**

Material Review Board  
Corrective Action Plans  
More to Follow